

Fig. 1

Search	Agent	Last	Update	ADD	Server Name	User Name	Password
					LBC.com	John Doe	XXXXXXX
					My Bank.com	John R. Doe	XXXXXX
					My Stocks.com	John R. Doe	XXXXXXXXXX
					My Shopping.com	Jane L. Doe	XXXXXXX
					Mortgage.Com	John/Jane Doe	XXXXXXXXXXXX
					Airline.com	John Doe	XXXXXXX

Search String

Fig. 2

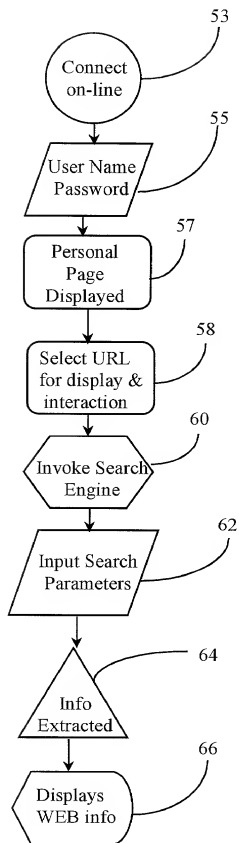


Fig. 3

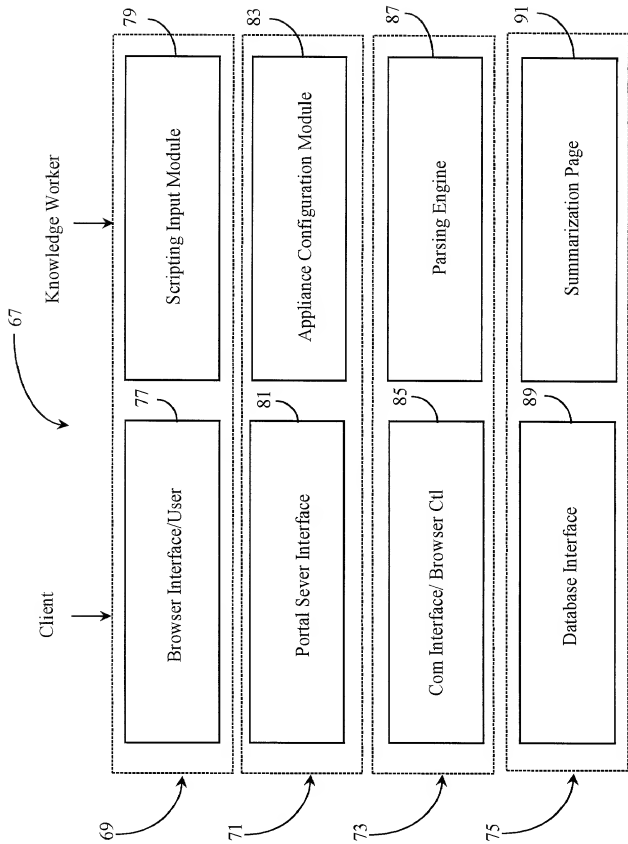


Fig. 4

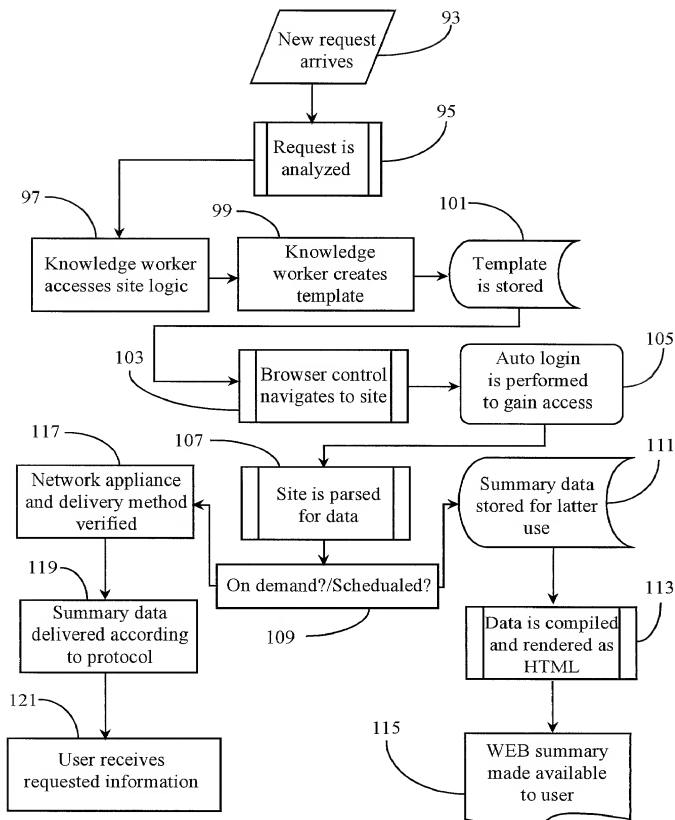


Fig. 5

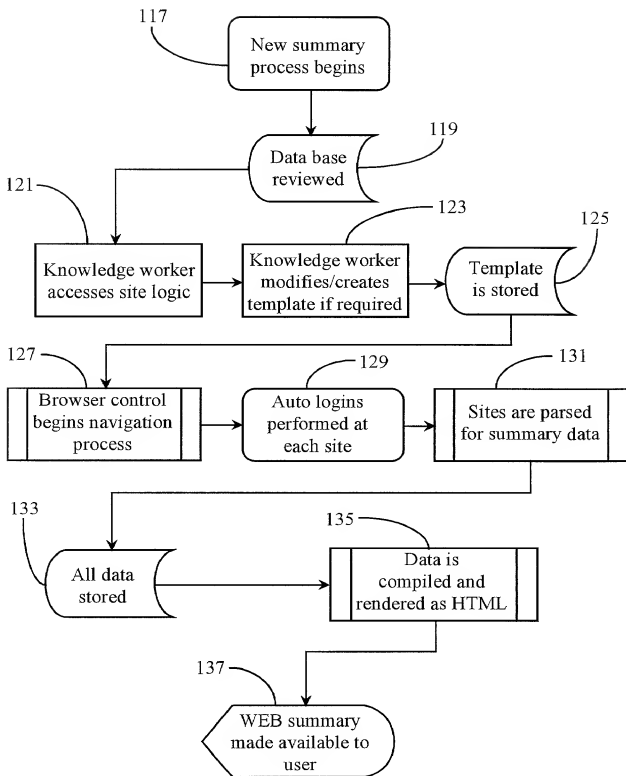


Fig. 6

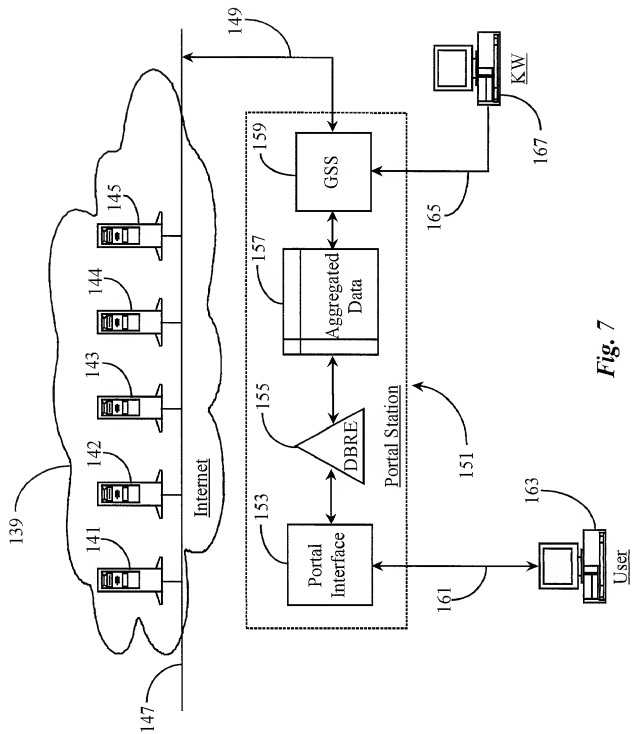


Fig. 7

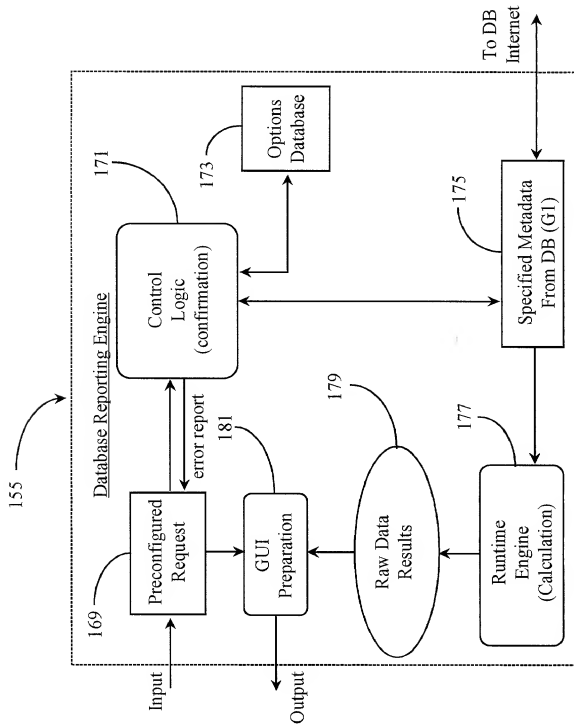


Fig. 8

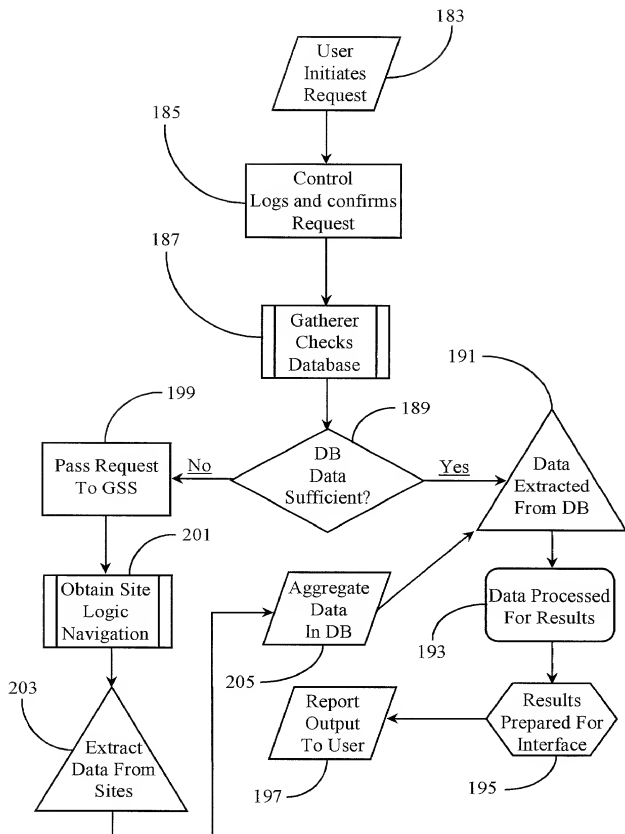


Fig. 9

Personal's Yodlee-Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Reload

Address <http://www.yodlee.com/manager2/login?unit=61426&unit=61426&unit=61426>

Link

Banks

Account	Balance	Last Refresh: 8 days ago - Refresh
Savings - 1	0.15	

Wells Fargo

Account	Balance	Last Refresh: 8 days ago - Refresh
CHECKING	34073.92	
CHECKING	25457.68	
MRA	40779.89	
SAVINGS	101.60	

Bank Summary

Account	Amount
TOTAL BALANCE	11131.24

Investments

Datask Online

Symbol	Quote	Quantity	\$ Change
CSGO	69	1	- 3.8
HLIT	112.38	1	+ 4.516
portfolio balance			N/A
Total Account Balance			2029.55

Investment Summary

Summary

Account	Amount
TOTAL STOCK BALANCE	181.375
TOTAL ACCOUNT VALUE	2029.55

Last Refresh: 2 hrs ago - Refresh

12:29 AM

Look into

Fig. 10

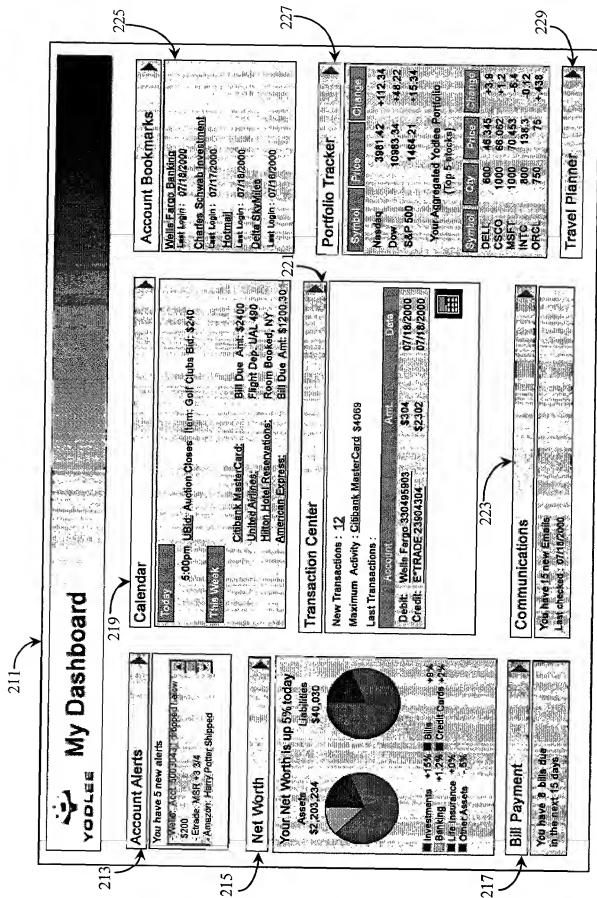



Fig. 11



My Dashboard

Tuesday, July 18th

TRANSACTION CENTER

New Transaction Summary

Chase Visa Credit Card : 5 new transactions

Wells Fargo Savings : 3 new transactions

Wells Fargo Checking : 2 new transactions

E*TRADE : 2 new transactions

243

245

247

249

Select an Account:

Chase Visa Credit

Date	Description	Amount	Category	Delete	Archive
07/14/2000	Pizza Hut, San Jose CA	\$34.12	Dining Out	<input type="checkbox"/>	<input type="checkbox"/>
07/15/2000	AT&T Wireless, CA	\$19.99	Utilities	<input type="checkbox"/>	<input type="checkbox"/>
07/16/2000	BEST BUY, Redwood City, CA	\$340.23	Home	<input checked="" type="checkbox"/>	<input type="checkbox"/>
07/17/2000	Honda City, San Jose, CA	\$72.54	Auto	<input type="checkbox"/>	<input type="checkbox"/>
07/18/2000	Barnes and Noble, San Jose CA	\$13.02	Misc.	<input checked="" type="checkbox"/>	<input type="checkbox"/>

251

253

255

Email My CPA

View History

Bill Payment

Fig. 13

257

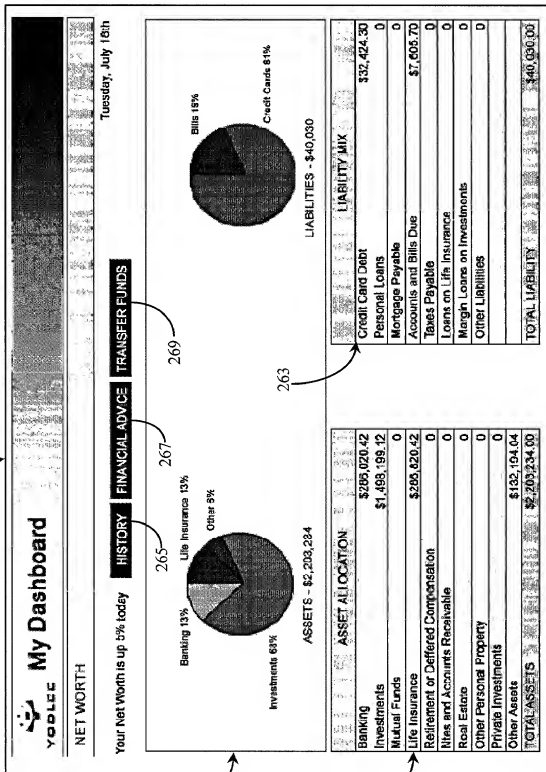
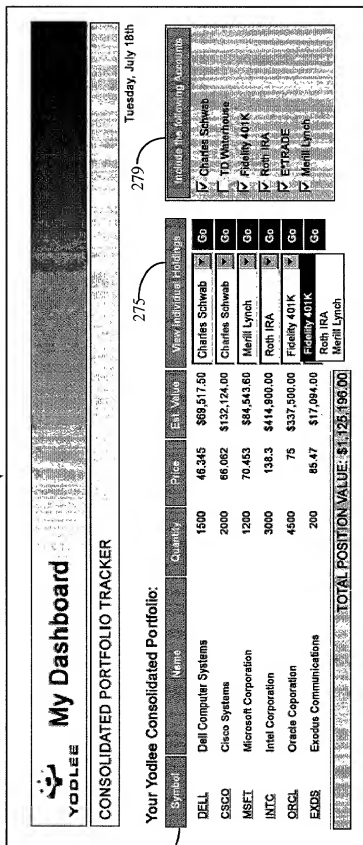


Fig. 14

271



273

275

Fig. 15

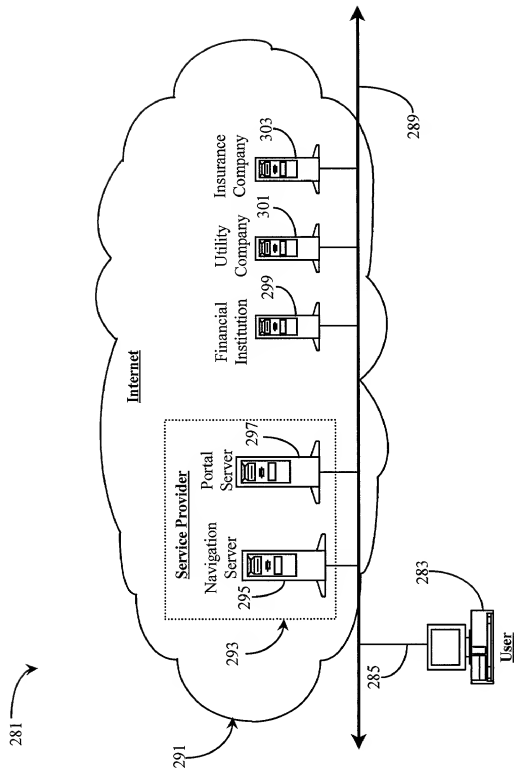
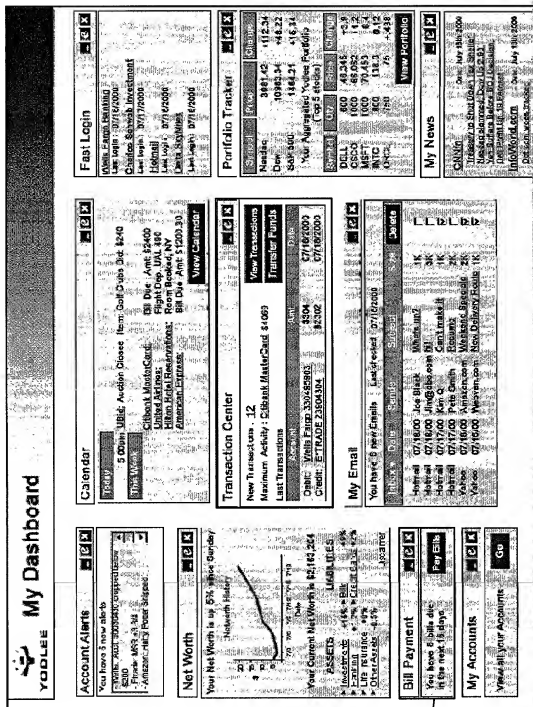


Fig. 16



Bill Payment Center

My Dashboard

323

325

327

329

330

332

334

View History

Recurring Payments

Pay Anyone

Transfer Funds

Calendar

Preferences

Refresh All

311

313

315

317

319

321

Bill Inbox

Due Date

Payee

Account #

Amount Due

Balance

Refresh Status

Bill Toolbox

07/20/2000	Citibank MasterCard	123456-xxx	\$2400.00	\$2400.00	6 hours ago	View Bill Pay Bill Mark as Paid Delete Advice Alerts
07/22/2000	Pacific Bell	515 555 1212	\$ 300.45	\$100.23	3 hours ago	View Bill Pay Bill Mark as Paid Delete Advice Alerts
07/23/2000	PayPal-Jimith@acme.com	joe@yodlee.com	\$ 100.34	\$100.34	317 hours ago	View Bill Pay Bill Mark as Paid Delete Advice Alerts
07/24/2000	American Express	3154-545-543	\$1000.00	\$1009.00	2 hours ago	View Bill Pay Bill Mark as Paid Delete Advice Alerts
07/25/2000	Esby, Big Bertha Driver	IlonW 528053	\$175.00	N/A	6 min. ago	View Bill Pay Bill Mark as Paid Delete Advice Alerts
07/26/2000	Sallie Mae	2456789	\$250.00	\$15,000.00	1 day ago	View Bill Pay Bill Mark as Paid Delete Advice Alerts
07/30/2000	State Farm Insurance	47599-6325	\$65.35	N/A	4 hours ago	View Bill Pay Bill Mark as Paid Delete Advice Alerts
08/05/2000	Countryside Home Loans	36521-2523	\$2,764.34	\$253,404.23	25 min ago	View Bill Pay Bill Mark as Paid Delete Advice Alerts

331

333

Payment Accounts

Account Name

Account Number

Account Type

Account Balance

Refresh Status

Wells Fargo	2500-3000	Checking	\$4,344.23	6 hours ago
Bank of America	475-555-555	Savings	\$10,354.54	3 hours ago
PayPal	joe@yodlee.com	P2P	\$(75.00)	1 hour ago
E-Trace	HX-54875	Checking	\$26,253.26	2 hours ago

Fig. 18

Mark as Paid - Input form

My Dashboard

BILL PAYMENT CENTER

[New Trade](#)
[Resolving Payments](#)
[Car/Airplane](#)
[Items to Fund](#)
[Collection](#)
[Initiate Sale](#)

Bill Intox

07/27/2000 Pay Pal Jander @ Sacale Co VA
07/27/2000 Acct Billing Express
07/28/2000 EBAY- eBay Service Unsub 333
07/28/2000 3rd Party Mail
07/30/2000 State Farm Insurance
08/06/2000 Countrywide Home Loans

Mark as Paid - Input Form
Bill: Pacific Bell
Amount Due: \$300.45
Account Balance: \$60.23
Due Date: 07/22/00
Payment Date: 07/25/00
Account Debited: Citibank Checking
Amount to Pay: \$300.45
Purpose: Utilities

Payment Accounts

Media Express	25-90-3500	Checking	34,343.23
Bank of America	470-590-600	Savings	\$ 3,734.94
Baytel	00200001001	PAID	\$ (75.00)
Trade	HK-54875	Checking	\$25,263.25

1 hour ago	View Bill
1 hour ago	Pay Bill
1 hour ago	Mark as Paid
1 hour ago	Use auto
1 hour ago	Advice
1 hour ago	Alerts
1 hour ago	View Bill
1 hour ago	View Bill

Fig. 19

Time/Debit Configure Interface



My Dashboard

CREDIT CARD CALCULATORS

Choose a credit card calculator : **How long will it take to pay off my balance?**

How long will it take to pay off my balance?

Inputs (These fields have been pre-filled using your existing account info.)

Amount Now Owed	\$ 2,400
Future Monthly Charges	\$ 1,500
Future Monthly Payments	\$ 1,700
Annual Rate	% 9.99
Annual Fee	\$ 0
Desired Months Until Pay Off	6

Future Rate Change :

☐ None

☒ An Increase of % per year

☐ A Decrease of % per year

RESULTS

By paying off your debt now, you will save \$138 in interest costs per year.

In order to pay off your \$2,400 balance in the desired 6 months, you'll need to increase your monthly payments to \$1,913 and cease making further charges to your card.

Otherwise, given your anticipated payments of \$1,700, you'll repay your outstanding balance in 13 months

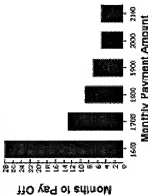



Fig. 20

View Bill Payment History


My Dashboard

BILL PAYMENT CENTER

Dashboard


Bill Payment History - Last 10 Payments and Transfers

Date Paid	Status	Payee	Paid From Account	Amount Paid
07/20/2000	Pending	John Smith (jsmith@acme.com)	PayPal	\$100.34
07/20/2000	Pending	Paydirt Real	CitiBank Checking	\$500.45
07/20/2000	Pending	CitiBank MasterCard	CitiBank Checking	\$ 2400.00
07/16/2000	Pending	MCI Worldcom	Fidelity MMA	\$ 33.08
07/16/2000	Complete	John Smith (jsmith@acme.com)	PayPal	\$100.00
07/15/2000	Complete	State Farm Insurance	Fidelity MMA	\$240.00
07/14/2000	Complete	Funds Transfer from E-TRADE	Prudential	\$1,000.00
07/13/2000	NSF	Funds Transfer from BankOne	E-TRADE	\$531.34
07/13/2000	Rejected	Patty Neal (patty@hotmail.com)	BillPoint	\$32.15
07/12/2000	Complete	Discover Card	CitiBank Checking	\$3,234.00

Next 10 payments

Fig. 21

Transfer Funds


My Dashboard

TRANSFER FUNDS

Dashboard

TRANSFER:

\$500

ON:

09/22/00

FROM:

Wells Fargo Banking - 1234567-xxx

BankOne - 234567890

ETRADE - 98765-4xxx

Wells Fargo Banking - 1234567-xxx

Wells Fargo Banking - 2145678-xxx

TO:

BankOne - 234567890

BankOne - 4567890123

ETRADE - 98765-4xxx

Wells Fargo Banking - 1234567-xxx

Wells Fargo Banking - 2145678-xxx

341

Transfer Funds

Add a New Account

Cancel

Pending Transfers

Transfer Date	From	To	Amount
09/28/00	Wells Fargo Banking - 1234567890-xxx	ETRADE - 987654321-xxx	\$500.00

Inquire

Last 10 Payments and Transfers

Date	Status	From Account	Payee	Amount
08/28/00	Pending	Wells Fargo Banking	Funds Transfer to ETRADE	\$500.00
08/12/00	Complete	Fidelity MMA	Lancard	\$1,500.00
06/11/00	Complete	Wells Fargo Checking	AT&T	\$328.7
06/11/00	Complete	Wells Fargo Checking	PacBell	\$33.08
06/10/00	Complete	PayPal	John Smith	\$100.00
06/10/00	Complete	Fidelity MMA	State Farm Insurance	\$740.00

Active Balance

Wells Fargo Banking - 1234567-xxx

Current Balance

\$3,000.25

Wells Fargo Mastercard

(\$2,400.00)

Final Balance

\$600.25

Left List

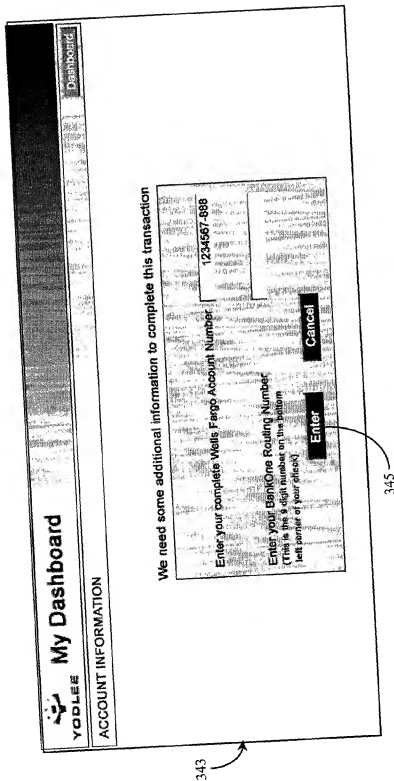
BankOne - 234567890

Current Balance


\$1,500.51

Fig. 22

Account Information



Transfer Confirmation


YODLEE

My Dashboard

TRANSFER CONFIRMATION

Dashboard



You have requested the following transaction

Transfer \$500	from Wells Fargo Banking - 1234567-898
	to BankOne - 2398036798
Routing # 987987987	for 09/20/00

Please confirm these fund transfer details

Fig. 24

Pay Bill

[My Account](#)
[Send Money](#)
[Request Money](#)
[Web Tools](#)
[Auction Tools](#)

[Overview](#)
[Add Funds](#)
[Withdraw Funds](#)
[Savings](#)
[Profile](#)
[Settings](#)

[Money Request Details](#)

Request Received

From: [ismith@acme.cit](#)

To: [joe@vsn.com](#)

Subject: The Money You Owe Me

Note:

Status: **Amount**
S 100.00

Penalty:

☐ Click here if you would like a receipt of this transaction sent via email


[Pay](#)
[Cancel/View Progress](#)
[Refund to You Account](#)

349

350

Fig. 25

User Confirmation


BILL PAYMENT CENTER

Dashboard

If you just paid PayPal - jsmith@acme.com, please confirm the following information and the item will be removed from your inbox and placed in the payment history.

If you didn't pay this bill and you want to keep this bill in your inbox please select cancel

Billers : PayPal - jsmith@acme.com

Amount Due: \$100.34

Account Balance: \$100.34

Due Date: 07/23/00

Payment Date: 07/20/00

Account Debited: PayPal - jsmith@acme.com

Amount Paid: \$100.34

Purpose: Personal

Cancel **Confirm**

Fig. 26

Pay Anyone

Enter the payment information below, then click **Pay Now** to send the payment.

Jeanie Cunningham 1234 Happy Days Drive Small Town, CA 12345		Payment Date*: 09/08/2000
Pay to the order of: Richie Cunningham - Brother	Amount: \$ 30.00	
		From Bank Account: My Checking 1234567

Pay Now

*The Payment Date is the date you expect your payee to receive this payment.

Fig. 27

View Bill



ClipPlacedSM • Account Online • Financial Solutions • Credit Matters • Shopping Advice • Privacy • U.S. Cards Home

statements account
ONLINE



- Account Online Home
- Account Summary
- Unfilled Activity Statements
- Vote a Payment
- Account Management
- Express Request
- Help/Contact Us
- Feedback
- Logout

U:\716\U

Click Reference

Minimum Payment Due

Payrent due date: 07/20/00

credit limit	27,128.28
	27,128.28

Activity Summary

REVIEWS PAGE

Agreements and Adjustments: **MC2.46**

Increases: \$2,470.30

Loch Associates & Cheeko	\$0.00
	\$0.00

Finance Charge: \$217.70

NEW BALL ICE.

The following transactions have been posted to your account for this statement.

Payments and Adjustments

Trans Date	Pos: Date	Description	Amount
------------	-----------	-------------	--------

DATE	DESCRIPTION	AMOUNT
07/02/00	WARRI AND C&R PAYMENT	\$182.43

	6407.4
.....
1983-84	6407.4

Purchases, Cash Advances and Checks, and Fees

Fig. 28

Recurring Payments

Repeating Payments

The payments on this list are generated based on a schedule specified by you. You may add new Repeating Payment schedules, or edit the ones you currently have in this list.

Add New Repeating Payment

Payee	Payment Description	Amount	Frequency	Start Date	Next Payment	View/Edit Delete
Chun Inwide	Mortgage	\$1,000.00	Once Every Month	Unit Further Notice	Mr. Jackson 1234567	View/Edit Delete
Chun Mutual Group	Life Insurance	\$250.00	Once Every Month	Unit Further Notice	Mr. Jackson 1234567	View/Edit Delete

Fig. 29

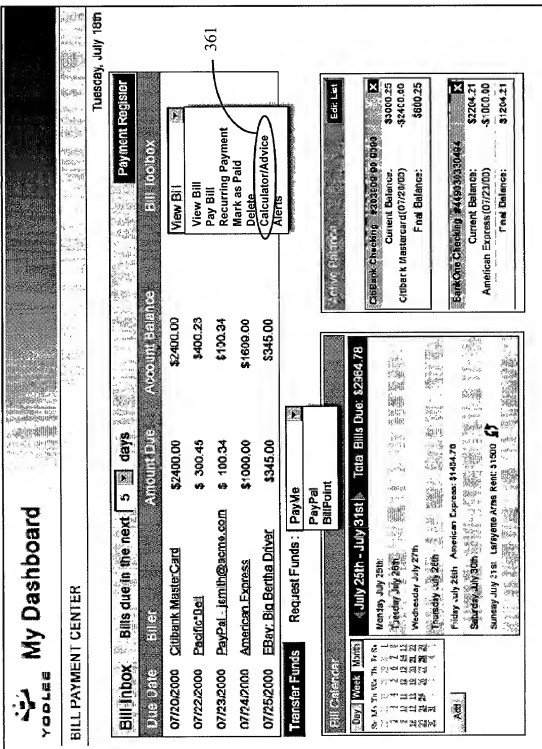


Fig. 30

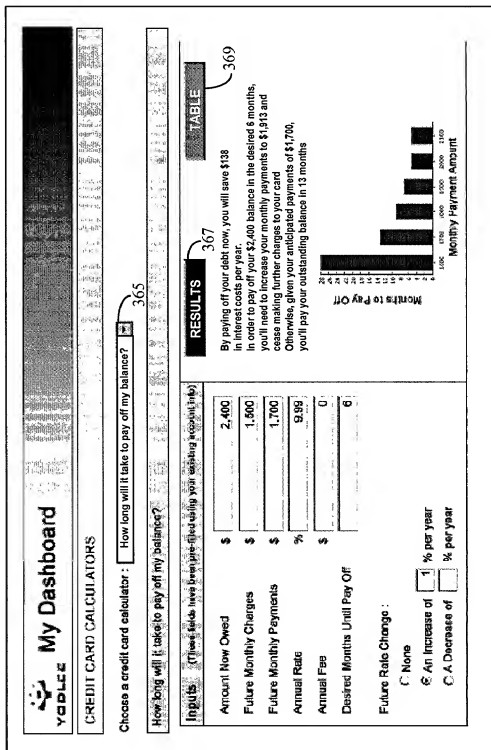


Fig. 31

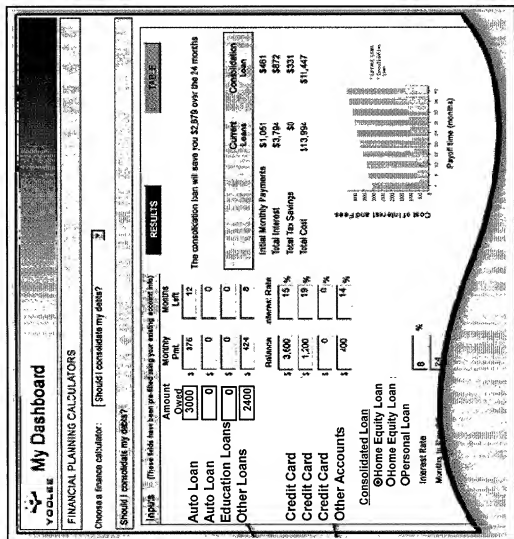


Fig. 32